

Orange County Clerk of the Board of Supervisors



2003 Business Plan

"The mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government."

"Where service and information are at your fingertips"

Clerk of the Board

2003 Business Plan

Darlene J. Bloom
Clerk of the Board

“Where service and information are at your fingertips”



Clerk of the Board of Supervisors

10 Civic Center Plaza, Suite 465
Santa Ana, CA 92701
(714) 834-3453 ** FAX (714) 834-4439

Darlene J. Bloom
Clerk of the Board

January 2003

Dear Readers:

We are pleased to present the Orange County Clerk of the Board's 2003 Business Plan.

The Plan provides the focus and direction of our office for the year and future. The Department's mission and goal setting process for the year is accomplished with the input and insight of all Clerk of the Board staff. It is truly a cooperative team effort.

The Clerk of the Board Department is ever changing in an attempt to enhance and expand service levels to the citizens of Orange County, as reflected in our Mission Statement: to provide the County and its citizens easy access to information, and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

I encourage you to read our Plan. As always, we look forward to serving Orange County.

Sincerely,

Darlene J. Bloom
Clerk of the Board

Table of Contents

I.	Executive Summary	4
II.	Mission & Goals	8
III.	Operational Plan for Each Goal	12
IV.	Appendices	22

I. EXECUTIVE SUMMARY

The Clerk of the Board's 2003 Business Plan presents a high level overview of the services the Department provides, 2002 accomplishments, goals for 2003, and strategies and projects to achieve those goals.

The Clerk of the Board is the official repository of County records and provides administrative support to the Board of Supervisors, the governing boards of certain districts and authorities and the Assessment Appeals Boards and Hearing Officers. The majority of its functions are defined and mandated by various California Statutes, Revenue and Taxation Codes, County Ordinances, Board Resolutions, County Rules of Procedure and by Board of Supervisors' policy.

The Department is comprised of three major divisions:

- Board Services which prepares and publishes agendas and minutes for the Board of Supervisors, processes legal publications, administers oaths of office for various elected and appointed officials and receives and processes claims, summons and complaints against the County.
- Assessment Appeals which receives and processes assessment appeals applications, schedules and publishes hearings in accordance with legal requirements, maintains minutes and official records of the assessment appeals process and provides assistance and education to the Assessment Appeals Board Members and public on the assessment appeals process.
- Files Management & Administrative Services which manages the department's official records, responds to public records requests, assists the public and County departments/agencies with research of records, provides payroll, purchasing and personnel services to the Department and Board offices, and provides information systems support for Clerk of the Board staff.

The Clerk of the Board's commitment to providing the highest level of professional and courteous service possible to the Board of Supervisors, County departments/agencies, officials and citizens it serves is reflected in our Mission Statement:

"The mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government."

2002 Accomplishments

One major automation project this past year was the completion and implementation of Phase III of the Comprehensive Agenda Management Solution (CAMS) automated product countywide. Phase III consisted of training the remaining County agencies/departments. Once fully trained, departments can electronically submit their agenda item staff reports using this countywide system.

The CAMS automation system will increase efficiency without an increase in staff. This countywide system will assign, create, monitor and distribute Board of Supervisors' agenda items from their inception within a department through internal/external review and collaboration and distribution to the Board and public, including Internet access. It will ensure a consistent, easy to read reporting format to assist the Board and public during the decision-making process. Ultimately, the CAMS product will reduce paper flow, provide management tracking tools, increase file integrity, and provide enhanced retrieval of the County's legislative history. Due to its size and complexity and the need to address the varying needs of the individual departmental users, CAMS is being implemented on a multi-year schedule.

The Clerk of the Board has made many improvements to our website to increase accessibility of information and e-services. During the 2001-02 assessment appeals filing period, we introduced our online e-file assessment appeals smart form with intuitive logic. E-file assists taxpayers in completing their forms correctly with its "step by step" help, pop-up reminders/messages and printed helpful hints. Once registered with the Clerk of the Board, taxpayers or their agents can submit their applications in seconds from their own computer 24/7 and receive acknowledgement of receipt and their actual appeal number. Additionally, individuals can save their information and use it year after year or complete their application over a period of time before it is finalized. Individuals who are not

registered can still take advantage of e-file to complete their application online. An email is then forwarded to them upon printing of the application to remind them of the need to sign and mail the application to the Clerk of the Board timely. E-file also allows participants to track the status of their appeal through finalization. This automation process is of significant benefit to taxpayers and provides direct data entry for the Clerk of the Board, creating errorless transactions and timely processing of applications.

Orange County Clerk of the Board is a national leader in its innovative approaches to service, automation techniques and 24/7 e-commerce information, opportunities and solutions. Many assessment appeals forms, claim forms, Board agendas and minutes and bid schedules are available to the public. Also, under the direction of the Board of Supervisors, the public can now listen to live and past Board meetings over the Internet, as well as submit comments online regarding items being considered by the Board. The Clerk of the Board continues to expand its efforts to meet the ever-changing service needs of its customers.

During 2002, the Clerk of the Board began the next phase of the Hall of Administration remodel project in the Planning Commission Board Meeting Room. This upgrade is being done to meet Americans with Disabilities Act requirements and to upgrade the audio/video technology to current standards.

2003 Service Issues

In 2003, the Clerk of the Board will continue to focus on implementation and enhancement of our multi-year automation projects and on exploring options for greater public access to the multi-agency Property Tax Administration process and information. These improvements will ultimately result in more efficient procedures, enhanced collaboration and greater public access and services to our clients. The Assessor, along with the other property tax administration departments, has applied for AB 589 grant funds totaling more than \$6 million, which will enhance these activities within the property tax area.

The Department continues to focus on new automation techniques and public outreach to enhance service levels, as well as preserve documents and information retained by the Clerk of the Board. We will also be working to further enhance our website by modifying the look and feel to be more consistent with the overall County design. This will enable users to quickly access information and services as well as comply with Americans with Disabilities Act requirements.

Initial assessment appeal filings for this year have decreased by half over the 7,000 level the past several years. Unfortunately, in a volatile economic environment, it is very difficult to predict the amount of yearly assessment appeal filings. An extended slow economy could increase the number of filings over the next few years as well as the results of other legislation and/or litigation. With continued enhanced automation efforts, we are positioned to handle a significant increase in workload with minimal disruption and increase in staffing.

A pending Superior Court case involving a challenge of the Assessor's practice to increase property values above 2% per year under certain circumstances has resulted in an increased department workload with the receipt and processing of more than 3,000 claims for refund. The impact of this action, in the event it becomes a class action suit, is not certain at this time. Although we have already received a large number of claims for refunds of taxes, appeals and letters regarding this lawsuit which has had considerable press, the outcome could result in thousands more being filed. Newspaper articles have said there are somewhere between 50,000 and 500,000 potential appeals. Until the litigation is finalized through the court system we have no idea what the actual workload impact will be on this office.

The continued search for a central location for all Clerk of the Board staff remains an important challenge to resolve. Although it is one of the smallest County departments, Clerk of the Board is currently located in three separate buildings. It is essential that Board Services remain in the Hall of Administration. That location, however, will not accommodate the balance of the department's assessment appeals function that requires several hearing and deliberation rooms, public counter and staffing areas. It is difficult to manage and maintain continuity and cohesiveness among Department staff and Assessment Appeals Board members in such a separated environment. The multiple-location environment is also very confusing to the general public. It occasionally results in duplicate hearings because individuals go to the wrong location for their hearing. Additionally, individuals find it very frustrating when attempting to personally file an appeal with the Clerk. It further hampers the ability to provide management oversight, fully utilize staffing opportunities at peak workload periods, and weakens cross-training opportunities at peak workload periods in a highly regulated program.

II. MISSION & GOALS

Mission Statement

The Clerk of the Board's Mission Statement reflects our commitment to providing the highest level of service possible to the Boards, officials and citizens we serve:

"The mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government."

Goals

- Facilitate the decision and policy making of Orange County government
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients

Key Outcome Measures

- Percent of accurate agenda titles – this measurement assesses the Clerk's quality and accuracy in preparing the agenda in compliance with Brown Act requirements and identifies areas and issues that require training for agencies/departments.
- Percent of accurately completed and timely filed assessment appeals applications – this measurement assesses the success of the Clerk's training and outreach efforts to the public and tax agents.
- Percent of assessment appeals claims decided or waived within two-year deadline – this measurement assesses whether the Clerk's current policies and procedures result in processing all appeals within the statutory deadline.

- Percent of assessment appeals hearings held within one year of filing – this measures the Clerk’s success in meeting its customer service goal.
- Results of customer satisfaction surveys – the results from this indicator assess the Clerk’s success in meeting the needs of its customers in a professional and courteous manner. Four surveys have been created:
 - ➔ Assessment Appeals Hearings – rates services of assessment appeals staff by an assessment appeals applicant
 - ➔ Assessment Appeals Outreach for taxpayers – rates quality of Clerk of the Board workshop on assessment appeals process
 - ➔ Assessment Appeals Outreach for agents – rates quality of Clerk of the Board workshop on assessment appeals process
 - ➔ Clerk of the Board Department Survey – rates all areas of the Clerk of the Board. Sent out to all County departments/agencies and Board Offices

Key Outcome Indicator Reporting

Performance Measure	2001 Results	2002 Results	2003 Plan	How are we doing??
PERCENT OF ACCURATE AGENDA TITLES What: Measurement of Clerk of the Board’s accuracy and training Why: This measurement assesses the Clerk’s quality and accuracy in preparing the agenda in compliance with Brown Act requirements, and identifies areas and issues that require training for agencies/departments.	COB 99.3%	99.3%	99.25%	COB rate continues to remain high
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS What: Indicator of taxpayers’ and agents’ understanding of applications and process Why: This measurement assesses the success of the Clerk’s training and outreach efforts to the public and tax agents.	91.2%	88.3% (includes miss-filed 2% claims)	85%	Pending litigation created public confusion for this filing period

Performance Measure	2001 Results	2002 Results	2003 Plan	How are we doing??
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN TWO-YEAR DEADLINE What: Indicator of success managing caseload to ensure required actions are taken before legal deadline Why: This measurement assesses whether the Clerk's current policies and procedures result in processing all appeals within the statutory deadline.	99.5% (still in progress)	Not yet available	100%	Meeting anticipated goal due to quality tracking of database information and appeals.
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD WITHIN ONE YEAR OF FILING What: Indicator of efficiency in processing and scheduling appeals Why: This measures the Clerk's success in meeting its customer service goal.	97%	100%	100%	With filings at a manageable level, COB has been successful in providing this level of client service.
RESULTS OF CUSTOMER SATISFACTION SURVEYS What: Measurement of success in meeting clients' needs Why: The results assess the Clerk's success in meeting the needs of its customers in a professional and courteous manner.	95% – 100%	96% – 100%	97%	Overall COB has received favorable ratings from 95 – 100% of respondents over past 2 years.

In addition, the Clerk of the Board encourages the promotion of personal and professional growth of our staff.

We will continue to conduct and implement new ways to help build department cohesiveness by many of the strategies listed below:

- Encourage career development skill opportunities/higher education
- Conduct annual off-site and quarterly meetings for all Clerk of the Board staff
- Work with corporate HR to ensure appropriate employee classifications
- Continue to search for a central location for Assessment Appeals staff/all staff

"Where service and information are at your fingertips"

- Continue to provide support and training to supervisors and staff for successful implementation of Performance Incentive Plan and Management Performance Plan and support staff who are involved as Performance Incentive Plan trainers and Labor Management Committee mediators
- Continue Employee Recognition Program (Shinning Star, TEAM Award, etc.)
- Continue sharing of computer-related information with staff through email tips and newsletters
- Continue to monitor departmental policies and procedures desk manual
- Continue Clerk of the Board semi-annual newsletter

III. OPERATIONAL PLANS

Overview

The focus of the Clerk of the Board's 2003 Business Plan is in continuing implementation of our multi-year automation projects and in exploring options for greater public access through web-enabled automation and revised web design. These improvements will ultimately result in streamlined and more efficient processes and more timely service to our clients, as well as enhanced public access and research capabilities.

One major automation project this year will be to complete the final phase of Comprehensive Agenda Management Solution product development. It was developed for use by County departments/agencies to plan and prepare agenda staff reports that can be electronically transmitted for collaboration, review, approval and final filing. It supports agenda planning, internal and external agenda item collaboration, County Executive Office review and concurrence, paperless electronic document submittal to the Clerk of the Board and Internet document access to interested parties. The product provides workflow management tools, enhanced review and collaboration among departments, improved reporting format and improved access to records and documents by County Department/Agencies and the general public. The final phase includes system modifications based on feedback from pilot project departments and long-term storage and retrieval of agenda documents from any PC within the County.

Another major automation project within the office is enhanced e-filing of assessment appeals applications and tracking application status online. This enhancement will provide greater public access to services, ensure accurate and complete form preparation and minimize possible data entry errors. It will expedite the period of time from filing to hearing and finalization of the application.

We will continue our efforts with the property tax administration departments in the database conversion project and visionary plan to provide a higher level of seamless 24/7 services to Orange County residents.

Due to automation, our current staffing level is adequate to meet current workloads. However, a result of automation has been a change in the skill

requirements and job duties for our staff. Many jobs are now less focused on manual processing of documents and more focused on providing policy and procedure guidance and higher-level review for quality control. Additionally, with the decentralization of administrative functions such as purchasing and human resources, different skills are needed to successfully handle those functions. COB, along with CEO/HR, will review our existing staffing resources to ensure they are appropriately classified in order for the COB to meet its business needs by recruiting and retaining qualified employees.

GOAL – Facilitate the decision and policy making of Orange County government.

Clients

The primary clients are the Board of Supervisors, the County Executive Office, County Agencies/Departments, the public and the media. The highest priority needs of these clients are to have timely, accurate and user-friendly access to information. Streamlined and easily understood procedures for the various filings submitted to the Clerk of the Board are also a high priority to internal County clients.

Challenges

As a small department, Clerk of the Board is dependent on outside vendors for development and maintenance of many automation products (i.e. Comprehensive Agenda Management Solution and online assessment appeals filing.) Our Information Systems division will continue to work closely with our outside vendors to ensure timely completion and accurate implementation of automation projects.

Another challenge is the monitoring of legislation. The Clerk of the Board is taking a proactive role in ensuring Orange County's interests are included/protected in any State legislation regarding issues related to our office by participating in statewide professional organizations.

Step 1 Reduction: This year we are in the process of completing the hearing room remodel by upgrading and remodeling the Planning Commission Hearing Room to ensure that it is ADA compliant, its audio/video equipment is compatible with the Board Hearing Room and that it meets the needs of its principle users. Funding for this project was moved from the Clerk of the Board's budget to capital projects in a

prior year. The total cost is estimated at approximately \$350,000. We are working with the principle users of the hearing room and anticipate funding will be provided by previously allocated ADA compliance funds and through a pro-rata share of cost to the benefiting users.

Resources

Clerk of the Board is funded by the County General Fund, including a small percentage of funds from California State Senate Bill 90 (SB 90 – Open Meetings Act). Each year, Clerk of the Board files a claim with the State of California for staff time in preparing the agendas for the Board of Supervisors’ meetings. However, due to the current State budget situation, SB 90 funds have been suspended.

Due to automation, our present staffing level is adequate to meet current workloads.

Strategy – Automation

1. Implement the countywide Comprehensive Agenda Management Solution.
2. Provide web-enabled access to agenda documents.
3. Redesign of Clerk of the Board website to provide easier access to information and services online and to ensure compliance with the Americans with Disabilities Act.
4. Provide countywide access to agenda documents and historical data.
5. Develop Agenda Staff Report (ASR) for Board Offices and countywide document retrieval system to OnBase

Strategy – Training

1. Update Board of Supervisors’ office services manual bi-annually to provide information to Board Offices on office services provided by Clerk of the Board.

Strategy – Legislative

1. Continue to clean up existing statutes that refer to “clerk” to define appropriate authority, e.g. Clerk of the Board, County Clerk, Clerk of the Court or Registrar.

2. Participate in monitoring legislation, which impacts the operations of the Clerk of the Board or mandate activities that are not paid for by the State.

Strategy – Administration

1. Update County Conflict of Interest Code to incorporate changes as well as establish Board policy on future codes.
2. Provide upgrades to Planning Commission Room to comply with Americans with Disabilities Act and operational needs.
3. Update Board of Supervisors' Rules of Procedure.
4. Support and participate in professional organizations to maximize coordination, networking and “best practices/cost saving ideas.”

Outcome Indicators	2001 Results	2002 Results	2003 Plan	How are we doing??
PERCENT OF ACCURATE AGENDA TITLES What: Measurement of Clerk of the Board's accuracy and training Why: This measurement assesses the Clerk's quality and accuracy in preparing the agenda in compliance with Brown Act requirements and identifies areas and issues that require training for agencies/departments.	COB 99.3%	99.3%	99.5%	COB accuracy rate continues to remain high

GOAL – Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.

Clients

The primary clients of the Assessment Appeals Division are the Assessment Appeals Board Members and Hearing Officers, taxpayers and their representatives (e.g. attorneys, accountants), County departments involved in the process (Assessor, Auditor-Controller, Treasurer-Tax Collector, Clerk-Recorder), cities and special districts and the State Board of Equalization. The critical needs of the Assessment Appeals clients are accessibility to information, user-friendly forms and instructions, and expedient resolution of appeals through timely processing of applications and scheduling of hearings.

Challenges

The national economy is sluggish. The housing market typically lags a year or two behind a weakened economy. The Assessor and the Clerk of the Board watch the market carefully and make an attempt to project future workloads. The State Board of Equalization has expanded appeals opportunities to taxpayers through enactment of legislation and relaxed interpretation of existing statutes. Clerk of the Board continues to utilize enhanced automation and public outreach to streamline the appeals process. Minor increases can be handled within the department's existing resources.

A higher level of training and counsel guidance for Assessment Appeals Board Members and Hearing Officers is necessary. This highly regulated area of law is ever changing. To ensure appropriate judgment and appraisal techniques are used to arrive at the correct value of property, greater and consistent legal advice needs to be made available during the process. Without this higher level of service, the County's property tax roll could be in jeopardy. Currently, County Counsel does not have the staff resources to provide this higher level of service. AB 589 funds are being requested for this service.

We will continue to work closely with the Property Tax Administration departments to monitor the economic and legislative influences to ensure appropriate department resources are provided to this program.

The Clerk of the Board will continue in its efforts to better meet the needs of its Assessment Appeals clients through projects such as: participating with the Property Tax Administration departments to implement the long-term vision of 24/7 access to information and services through use of AB 589 funds; increasing educational outreach efforts by participating in the Small Business Tax Workshop; and working with the State Board of Equalization to ensure adequate training for new Assessment Appeals Board members.

The main challenge is the continuing search for a central location for all Clerk of the Board and Assessment appeals staff. Although it is one of the smallest County departments, Clerk of the Board is currently located in three separate buildings. It hampers the ability to provide management oversight, fully utilize staffing opportunities at peak workload periods, and weakens cross-training opportunities at peak workload periods in a highly regulated program.

Resources

Due to continued low volumes of assessment appeals filing, Clerk of the Board currently has an adequate staffing level to meet the needs of the Division. Clerk of the Board is funded by the County General Fund including recovery of Property Tax Administration funds. The Assessor, Treasurer-Tax Collector, Auditor-Controller and Clerk of the Board are in the process of applying for approximately \$6 million in AB 589 funds to provide much needed extended services and automation upgrades and enhancements.

Strategy – Automation

1. Continue enhancements to existing Assessment Appeals systems to ensure consistency with statutes, streamlined processes and needed management tools and reports.
2. Continue to participate with other Property Tax Administration departments in implementing a long-term vision utilizing benefits of E-Commerce.
3. Continue to participate in the Assessment Tax System (ATS) conversion/development project to ensure that existing automation is converted from IDEAL (current software) to other more current and flexible development language (AB 589 funds).
4. Enhance and promote E-File as the County's filing choice for assessment appeals filers.

Strategy – Administration

1. Provide full-time attorney services to assist in appeals hearings, training and staff support of the more complicated cases currently being appealed (AB 589 funds).

Strategy – Training

1. Continue Assessment Appeals Board member quarterly training.
2. Continue inter-departmental training with Property Tax Administration departments.
3. Continue to participate in Public Interface meetings with Property Tax Administration departments.
4. Continue to provide training sessions with Orange County Property Tax Agents to ensure awareness of new laws, rules and processes affecting the assessment appeals process.

Strategy – Public Outreach

1. Implement the Property Tax Administration vision to increase availability of services and information on line.
2. Phase II of Data Entry System for Assessment Appeals. Promote, update and enhance Assessment Appeals online application for applicants to submit via the Internet.
3. Continue public education through targeted workshops on assessment appeals process and hearing preparation.
4. Continue to provide updated Assessment Appeals Board rules and procedures, pamphlets, general information brochures, instructions, forms with instructions, etc. on the internet and at County libraries.

Strategy – Legislative

1. Continue to monitor and implement State Board of Equalization legislative changes and administrative rule changes.
2. Continue to serve on statewide legislative committees to actively develop, review and participate in legislation affecting the Clerk of the Board operations and to ensure Orange County interests are protected.
3. Develop Assessment Appeals criteria for AB 589 funds.

Performance Measure	2001 Results	2002 Results	2003 Plan	How are we doing??
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS What: Indicator of taxpayers' and agents' understanding of applications and process Why: This measurement assesses the success of the Clerk's training and outreach efforts to the public and tax agents.	91.2%	88.3% (includes miss-filed 2% claims)	85%	Pending litigation created public confusion for this filing period
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN TWO-YEAR DEADLINE What: Indicator of success managing caseload to ensure required actions are taken before legal deadline Why: This measurement assesses whether the Clerk's current policies and procedures result in processing all appeals within the statutory deadline.	99.5% (still in progress)	Not yet available	100%	Meeting anticipated goal due to quality tracking of database information and appeals

Performance Measure	2001 Results	2002 Results	2003 Plan	How are we doing??
PERCENT OF ASSESSMENT APPEALS HEARING HELD WITHIN ONE YEAR OF FILING What: Indicator of efficiency in processing and scheduling appeals Why: This measures the Clerk's success in meeting its customer service goal.	97%	100%	100%	With filings at a manageable level, COB has been successful in providing this level of client service.
RESULTS OF CUSTOMER SATISFACTION SURVEYS What: Measurement of success in meeting clients' needs Why: The results assess the Clerk's success in meeting the needs of its customers in a professional and courteous manner.	<u>Hearings</u> 100% <u>Community Outreach</u> (taxpayers) 95% <u>Outreach</u> (agents) 100%	<u>Community Outreach</u> (taxpayers) 96% <u>PTA Workshop</u> N/A	97%	Overall COB has received favorable ratings from 95 – 100% of respondents over past 2 years.

GOAL: Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients

Clients

Primary clients are County departments/agencies, Board Offices, media and general public. The highest priority needs of these clients are to have timely, accurate and user-friendly access to information.

Challenges

As we rely more on automation for easy access to our department records, it is imperative that countywide resources remain sufficient to meet the growing needs of County departments. Further, assuring adequate recovery of system downtime and data corruption is imperative. We continue to monitor our network needs and disaster recovery processes.

Resources

Clerk of the Board has the necessary resources.

Strategy – Information

1. Preserve documents. Conversion of paper to electronic media for ease of access.
2. Phase 1 – Develop an automated program to centralize department's office procedures and documents in order to provide department staff with easier access to information.

Strategy – Administration

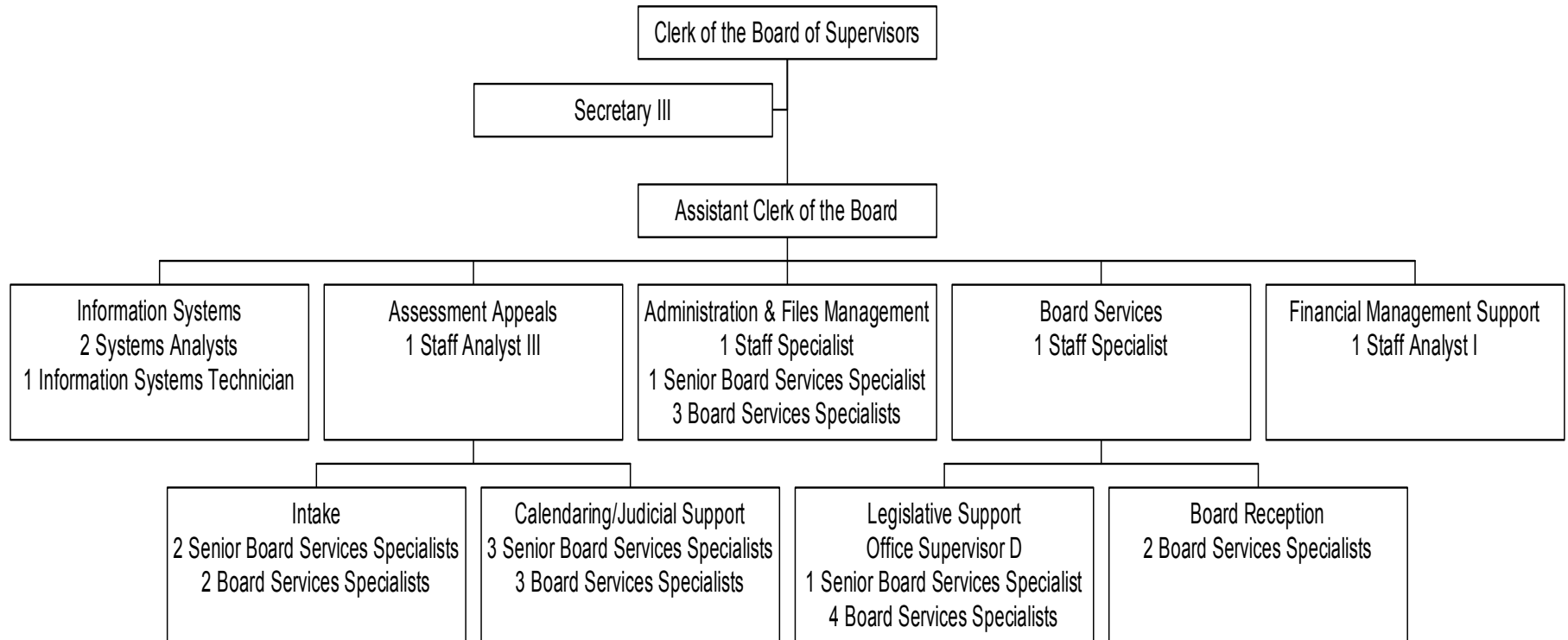
1. Continue to develop automated system to track applications, claims and other documents officially filed with Clerk of the Board.
2. Continue to study and develop alternative solutions to quickly implement Clerk of the Board operations in the case of disaster to avoid customer service disruption.
3. Develop an inventory system for office supplies.
4. Move 1995 Assessment Appeal petitions from basement to building 12; sort boxes and wand petitions.

Performance Measure	2001 Results	2002 Results	2003 Plan	How are we doing??
RESULTS OF CUSTOMER SATISFACTION SURVEYS What: Measurement of success in meeting clients' needs Why: The results assess the Clerk's success in meeting the needs of its customers in a professional and courteous manner.	N/A	<u>All COB</u> 100%	100%	COB has received favorable ratings from 100% of respondents.

IV. APPENDICES

- I. Organization Chart
- II. Management Team
- III. Labor Management Committee
- IV. Business Plan Team
- V. 2002 Accomplishments

I. Clerk of the Board Organization Chart



"Where service and information are at your fingertips"

II. MANAGEMENT TEAM

Clerk of the Board

Responsibilities: Oversees all divisions within the Clerk of the Board department; provides leadership, vision and direction in all department functions; participates in statewide legislative activities; conducts Assessment Appeals Board Members' training and community education and outreach; clerks Board of Supervisor meetings.

Assistant Clerk of the Board

Responsibilities: Direct Supervisor to division Managers and Supervisors; prepares and monitors the annual department budget; Human Resources Manager; oversees administration functions; assists Clerk of the Board at Board of Supervisor meetings and serves as Clerk in her absence.

Board Services Supervisor

Responsibilities: All Board of Supervisor agendas are prepared and published in accordance with legal requirements; records actions taken by the Board; maintains official rosters of County Boards, Commissions and Committees; processes legal publications, postings and notices; receives and administers bid openings for County projects; serves as filing officer and maintains Statement of Economic Interests; and receives and processes claims, summons and complaints against the County.

Assessment Appeals Manager

Responsibilities: Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides for the assistance and education on the assessment appeals process to the public and professional groups.

Files Management/Administration Supervisor

Responsibilities: Management of all records the Clerk of the Board is required to maintain; assistance to County staff and public with research and retrieval information; performance of purchasing, petty cash and payroll functions for Clerk of the Board and Board of Supervisors' Offices.

Information Systems Team

Responsibilities: Technical knowledge and coordination in development and implementation of automation projects and provides Countywide user trainings; provision of end-user systems support services for Clerk of the Board staff.

Staff Analyst

Responsibilities: Business Plan and Strategic Financial Plan coordination; collection of statistics for Clerk of the Board outcome measurements; compiles annual Senate Bill 90 State reimbursement claim; maintains Clerk of the Board procedures manual; clerks other Board created and state mandated commissions/committees.

III. LABOR MANAGEMENT COMMITTEE

Pat Martinez – Management representative

Charlene Weaver – Labor representative

The Clerk of the Board's Labor Management Committee (LMC) is unique in that it consists of members from various departments: Clerk of the Board, Clerk-Recorder, County Executive Office, Registrations and Elections and Orange County Employee Association.

Key business results the LMC achieved during fiscal year 2001/2002 are:

1. Increased participation and membership; and
2. Increased visibility/exposure and communication (outreach). The objectives were to make employees aware of:
 - Who their LMC members are;
 - Why the LMC exists;
 - What services the LMC offered;
 - Where and how to contact LMC members or a member; and
 - When to contact the LMC and/or a member.

To meet these objectives, the LMC:

1. Solicited other small departments for sponsors into the LMC.
2. Sponsored a Chili Spring Fling. This event enticed and encouraged department employees to gather and meet their LMC representatives, introduce LMC members, discuss the purpose of the LMC and its business objectives.
3. Created and distributed an LMC newsletter. The newsletter served the purpose of communicating key objectives to employees in departments represented by the LMC.
4. Participated in the County Cost Reduction effort by soliciting ideas from employees in respective departments and make certain to monitor feasibility analysis and potential implementation. The LMC is continuing its efforts in this area by performing cost studies of the ideas identified as the most feasible.

The LMC will carry over these key business goals and objectives during fiscal year 2002/2003. The Committee's efforts have been successful. However, due to a low necessity of the LMC's services, the objectives will remain to keep employees aware and informed of services and availability.

IV. BUSINESS PLAN TEAM

Jamie Ross – Business Plan coordinator

Darlene Bloom – provides input

Susan Novak – provides input

Pat Martinez – provides input

Sandra Case – provides input

Robin Stieler – provides input

Susan Counts – provides input

Van Au – provides input

V. 2002 ACCOMPLISHMENTS

Facilitate the decision and policy making of Orange County government by providing our stakeholders with timely and accurate information and guidance through the process

Strategy – Automation

1. Implement Comprehensive Agenda Management System countywide
 - *Completed December 2002.*
2. Provide web-enabled access to agenda documents
 - *In progress; agenda Staff Report was made available July 2002; exhibits available January 2003.*
3. Redesign of COB website to ensure compliance with the Americans with Disabilities Act
 - *Final design has been completed; user training November and December 2002.*

Strategy – Training

1. Update Board of Supervisors' administrative services manual
 - *As a cost saving measure, we will now update manual every two years; 2003 update completed January 2003.*

Strategy – Legislative

1. Legal issues regarding the Board of Supervisors, County Clerk-Recorder and Court Clerk for clarification of statutes
 - *Multi-year; statewide association implemented multi-jurisdictional committee, which has begun the legislative clean-up activity and has found an author for the proposal; enacted SB 1019 which provides for partial clean-up of language.*
2. Participate in monitoring legislation
 - *Ongoing.*

Strategy – Administration

1. Develop Conflict of Interest Code update to incorporate changes within the County as well as a policy on future codes.
 - *Submitted item to Board of Supervisors to update County code December 2002.*
2. Provide upgrades of Planning Commission Hearing Room to meet ADA and operational needs
 - *Architectural review completed; County Agencies/Departments and other government entities using room to share in the cost of upgrades.*
3. Update Board of Supervisors Rule of Procedures
 - *Completed April 2002.*

Ensure timely resolution of assessment appeals and promote public understanding of the process

Strategy – Automation

1. Continue enhancements to existing assessment appeals systems to ensure consistency with statutes, streamline processes, and provide needed management tools
 - *Ongoing; DB2 conversion complete February 2002; updates are continuous and offer increased efficiency in processes and better monitoring capabilities as well as the ability to change processes due to new legislative changes.*
2. Participate with other Property Tax Administration departments in implementing a long-term vision utilizing benefits of E-Commerce
 - *Ongoing; applied for \$6 million in AB 589 grant funds to enhance activities within the property tax area.*
3. Complete phase of online filing for digital signature
 - *Registered applicants/agents who use the online e-filing Program and issue a PIN; appropriate authorization obtained through DES 2002 program, which satisfies legal/mandated signature concerns.*

Strategy – Training

1. Continue Assessment Appeals Board member quarterly training
 - *Ongoing; training held February 2 and June 14 and September 2002.*
2. Continue inter-departmental training with Property Tax Administration departments
 - *Updated PowerPoint presentation October 2002.*
3. Continue to participate in Public Interface interdepartmental quarterly meetings with Property Tax Administration departments
 - *Ongoing.*

Strategy – Public Outreach

1. Implementation of Property Tax Administration Vision to increase availability of services and information on-line
 - *Project updates/enhancements are dependent on AB 589 funds.*
2. Continue public education through targeted workshops on Assessment Appeals process
 - *Completed and ongoing; presentation on website. Scheduled workshops for January 17, March 12, May 13, July 16, September 17, and November 13, 2002.*
3. Continue to provide updated Assessment Appeals Board rules and procedure pamphlets, general information brochures, instructions, forms with instructions, etc. on the internet and County libraries
 - *Ongoing; Board Rules and Procedures adopted February 2002 by Board of Supervisors; Hearing guidelines revised and distributed July 2002; new SBE forms and instructions completed April 2002.*
4. Develop an online AA application for applicants to submit via the internet
 - *Completed August 2002.*

Strategy – Legislative

1. Continue to monitor and implement State Board of Equalization legislative changes
 - *Ongoing; implemented 305.3 script in February; implementation of year 2002-03 changes on SBE form and instructions completed July 2002.*
2. Continue to serve on statewide legislative committees to actively develop, review and participate in legislation affecting the Clerk of the Board operations and to ensure Orange County's interests are protected
 - *Ongoing; participated in several legislative meetings in support of Clerk of the Board functions.*

Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients

Strategy – Information

1. Preservation of documents; conversion of paper to electronic media for ease of access
 - *Both historical and current are being done; some of the historical documents have already been filmed; more of these documents will be filmed for public access while the original documents are being environmentally preserved in storage; auto storage of assessment appeals applications filed online via new Data Entry Program implemented August 2002.*

Strategy – Administration

1. Continue to develop automated system to track petitions, claims and other documents officially filed with Clerk of the Board
 - *Access database created for Prop 13 and penalty claims; templates for other claim databases created but not developed.*
2. Disaster Plan – continue to study and develop alternative solutions to quickly implement Clerk of the Board operations in the case of disaster to avoid customer service disruption
 - *Funds to continue the study of this project are included in AB 589 funds.*
3. Training room project in building 12 (Intake)
 - *March 2002 – four portable computer-working stations were purchased.*
 - *Completed June 2002.*

"Where service and information are at your fingertips"